RPlan

Administration

User Guide
RPlan 6.2

ACTANO LLC
207 E. Redwood St.
Suite 1000
Baltimore, MD 21202
USA

Phone (410) 3 85-12 90
Fax (410) 3 85-88 45
info@actano.com
www.actano.com

RPlan Version 6.2

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RPlan administration

Introduction

Projects, schedules, departments, users, resources and favorites lists are created in RPlan administration and inserted at the desired place in the organization and project structure. At the same time, rights are assigned to specific users to allow them to view or change planning data or the project and organization structure.

The sections below describe all procedures in RPlan administration. A list of users authorized to perform each relevant action is shown in the margin of each section. A detailed explanation of the various user groups including all rights follows at the end of the manual (see also "Authorizations", page 37).

Selection dialog box

The selection dialog box is the environment in which you perform all administrative tasks. It is available both in the Schedule Manager and in the Resource Manager.

When you start the Schedule Manager or Resource Manger from the RPlan bar, the selection dialog box is opened automatically. In an active module you open the dialog box by choosing the menu items *File* → *Open* or by clicking on the *Open* icon. The title bar of the dialog box indicates the module whose selection dialog box you have opened, i.e. *Selection Dialog – Schedule Manager* or *Selection Dialog – Resource Manager*.

If you have authorization for a single module only, you are shown that module together with the selection dialog box when you start the Schedule Manager or Resource Manager.

The selection dialog box has four tabs. The *Projects*, *Organization* and *Favorites lists* tabs are identical in both modules. The fourth tab is titled *Links* in the Schedule Manager and *Requests/Approvals* in the Resource Manager.

In both modules the *Projects* and *Organization* tabs give you access to the project and organization structure tree. The *Views* tab lets you group schedules or resource objects into what are known as 'views' and then displays the views (see also section "Ease of use through favorites lists" in the "RPlan Schedule Manager" manual). In the Schedule Manager the *Links* tab provides an overview of the valid *Active Links* and *Synchrolinks* for the user logged in (see also section "Actively networking projects" in the "RPlan Schedule Manager" manual). In the Resource Manager the *Requests/Approvals* tab displays the resource agreements in which the user logged in is involved (see section "The principle of requests and approvals" in the "RPlan Resource Manager" manual).

A search function has also been integrated in the selection dialog box. The result of a search is shown on an additional *Search Result* tab that is only displayed when a search is performed (for information on the search function refer to "Searching in the database" on page 35).

The current display of the structure trees is saved. For example, you open the project tree at a schedule of a sub-project and then close the selection dialog box. When you open the selection dialog box again, the project tree is displayed as it was when you last closed the dialog box.

In the selection dialog box you can select all functions using either the context menu (right mouse button) or the toolbar.

Abbreviations

This RPlan administration manual deals with both the Schedule Manager and the Resource Manager modules. However, some sections are module-specific. These are marked with the abbreviations below to identify the relevant module.

Module	Abbreviation
Schedule Manager	SM
Resource Manager	RM

Organization structure

Open the *Selection* dialog box using the menu items *File* → *Open*. Switch to the *Organization* tab. To make changes to the organization structure you expand the organization structure tree by double-clicking on the desired departments.

Icons used in the organization tree

The icons in the organization tree have the following meanings:

- Department
- Project team
- Pool
- User
- Resource
- Schedule
- Schedule with real-world planning
- Schedule with scenario planning
- Own object

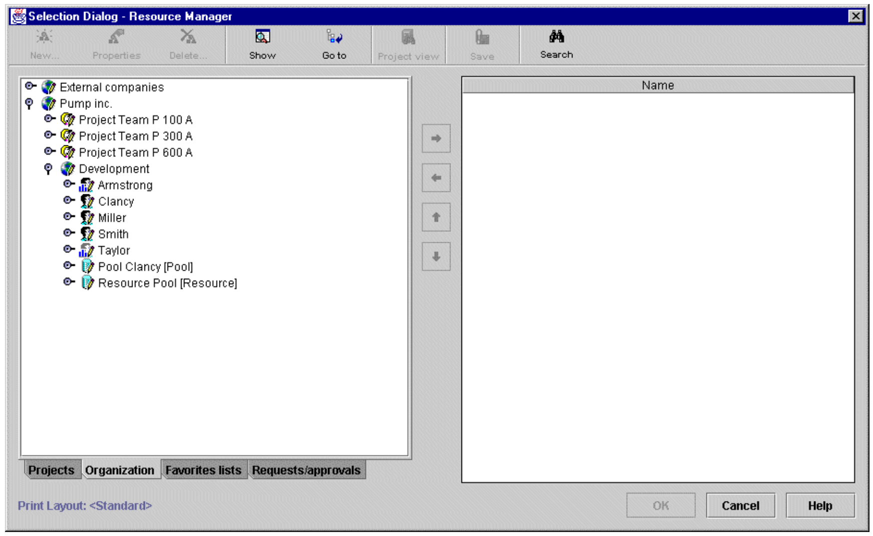


Figure 1: The organization tree in RPlan administration

Improved overview in the organization tree

To improve the overview of the organization tree, you are able to modify how it is displayed (Figure 2). Click with the right mouse button on the organization tree and choose View in the context menu.

- **As Root** restricts the view to a subtree. The organization structure below the highlighted object is displayed.
- **Whole Tree** redisplays the complete organization structure.
- **Own Objects** restricts the view to the schedules of the user currently logged in. Clicking on *Own Objects* a second time displays the complete organization structure again.
- **Display Organizations Only** hides all users and schedules so that only the organization structure (departments and teams) are visible.

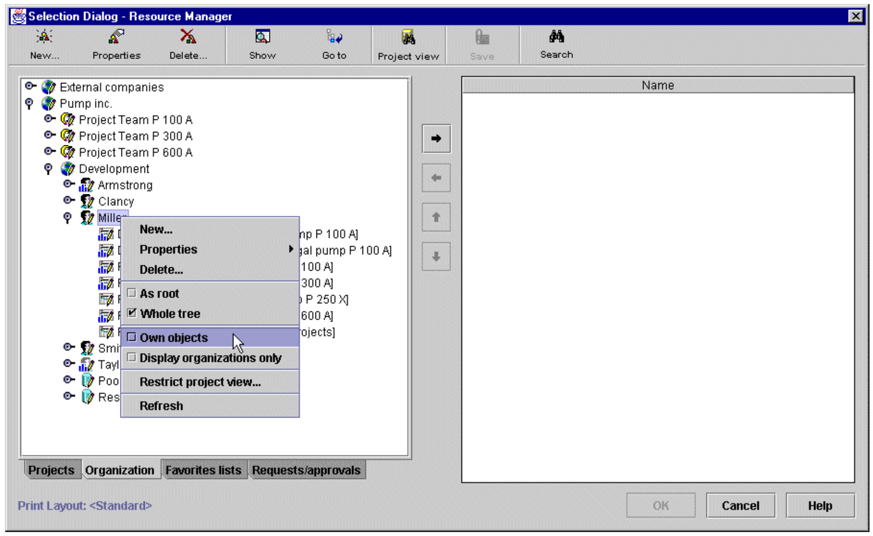


Figure 2: The tree display can be modified using the content menu.

Creating a department

Authorized persons:

- Organization manager
- Administrator

Authorized persons

All rights groups of the Resource Manager include the authorizations of the correspondingly named Schedule Manager groups, supplemented by specific Resource Manager rights (e.g. a Resource Manager project leader has all rights of the Schedule Manager project leader plus resource-specific rights).

Cf. "Authorizations" on page 37.

To create a new department click with the right mouse button on the department in the organization tree below which the new department is to be inserted. Then choose *New* → *Department* in the context menu.

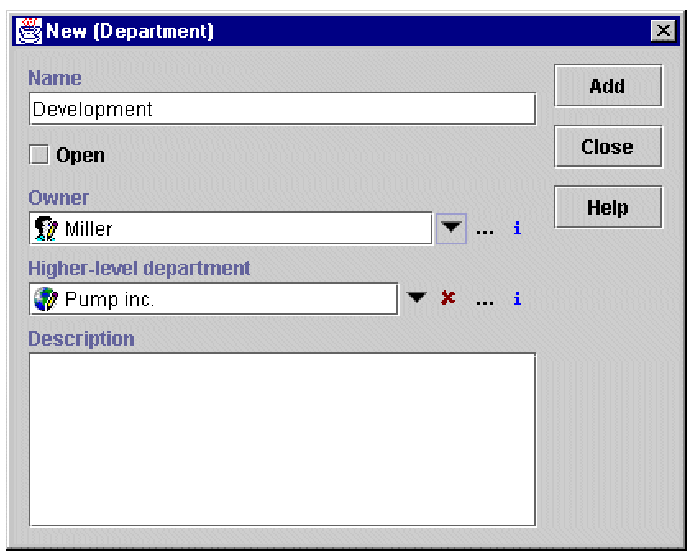


Figure 3: Creating a department

In the dialog box enter a name for the department as well as a brief description under *Description*.

...

Your own name is preset under *Owner*. To assign the department to another owner, click on the *Selection* button in the *Owner* field. In the *Selection* dialog box you can now look for a user to whom the new department is to be assigned in the organization tree. Highlight the user and click on *OK*.

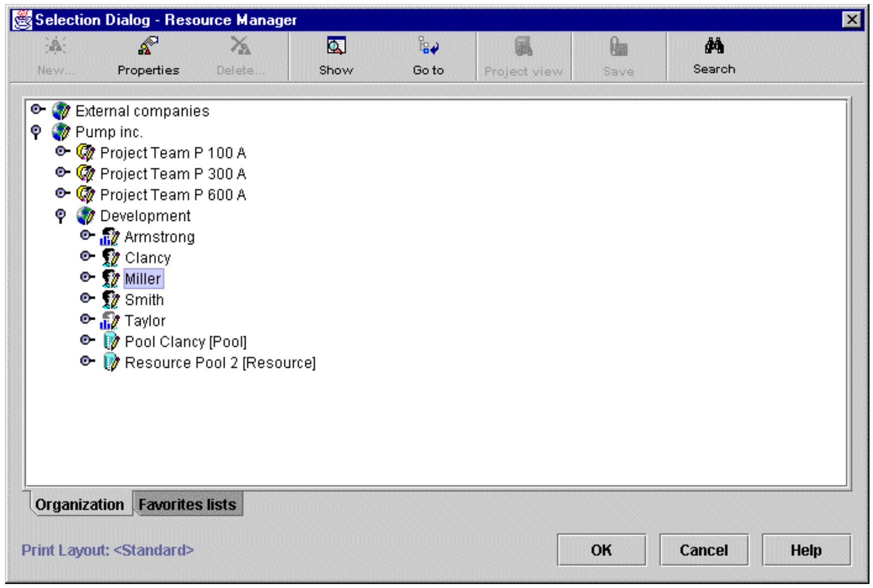


Figure 4: Selecting an owner

Higher-Level Department displays the department you highlighted beforehand. You can choose a different department using the *Selection* button. To create a department on the top level of the tree, you must delete the higher-level department using the *Delete* button.

Open department

The *New (Department)* dialog box contains an *Open* option. If you select this option when creating a department, you enable all project managers to create teams which are subordinate to this department. If *Open* is not selected, only administrators and organization managers are allowed to do this. This option applies *only* to the specified department. The owner of each lower-level department is responsible for defining *Open* once again.

Click on *Add* to complete creation of the new department. The *New (Department)* dialog box remains open so that you can create additional new departments if necessary. Click on *Close* if you no longer want to create any additional departments.

Creating a team

Authorized persons:

- Organization manager
- Administrator
- Project manager (if open department)
- Owner of the department on the next higher level.

Not only departments but also teams can be created as organizational units within the structure tree. These are identified in the tree by the *Team* icon. It may be necessary to create a team to handle, for example, confidential projects. Such projects are released for a specific team but are not visible to other RPlan users (see also "Creating a project", page 25).

Teams differ from departments as follows:

- A user can be assigned to more than one team but only to one department (see also "Linking users", page 14).
- Users assigned the *project manager* rights group may only create teams within a department or team if the department/team is *open*. By contrast, users assigned the *organization manager* and *administrator* rights group (see also "Authorizations", page 37) may create departments.

This enables a matrix organization to be mapped in RPlan in which each employee belongs to a department but may, at the same time, belong to one or more project teams .

Like departments, teams are created using the *New* icon or in the context menu. Simply choose the *Team* option instead of the *Department* option. The rest of the procedure is the same as that for creating a department (see also "Creating a department", page 10).

Changing the properties of a department / team

Authorized persons:

- Organization manager
- Administrator
- Owner (teams only)

To change the properties of a department / team, highlight the department / team in the organization tree using the right mouse button. Choose *Properties* in the context menu. A dialog box supplied with the properties of the department / team opens in the same way as the *Create* dialog box (Figure 3). Click on *OK* to accept the changes.

Deleting a team

Authorized persons:

- Organization manager
- Administrator
- Owner (teams only)

A team can be deleted by authorized persons provided it no longer contains lower-level teams. Highlight the team to be deleted with the right mouse button and choose *Delete* in the context menu. Respond to the confirmation prompt with *OK*.

Creating a user

Authorized persons:

- Organization manager
- Administrator

To create a new user, highlight the department of the new user in the organization tree using the right mouse button and then choose *New* → *User* in the context menu. The dialog box shown in Figure 5 opens.

Enter the name of the new user in the upper part of the dialog box.

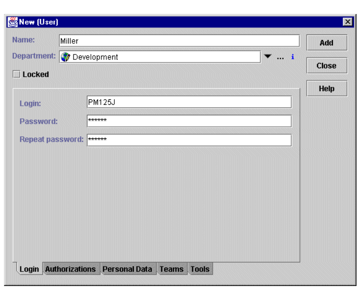
Uppercase/lowercase

Your login name is always converted to lowercase. A distinction is made between uppercase/lowercase for passwords only. All special characters except Ä, Ö. Ü, ß and blank are allowed for your login name and password.

The department you highlighted beforehand is preset in *Department*. Clicking on the *Selection* button takes you to the organization tree where you can assign the user to a different department.

The status of users is controlled by means of the 'locked' attribute. By default, users are not locked. They can log in to RPlan and have all the rights that have been assigned to them. Locked users ('locked' attribute selected) can no longer start RPlan. The data of locked users is not discarded.

Now enter a login name and a password for the user. Repeat your password in the lower field. Users can subsequently change their own passwords.



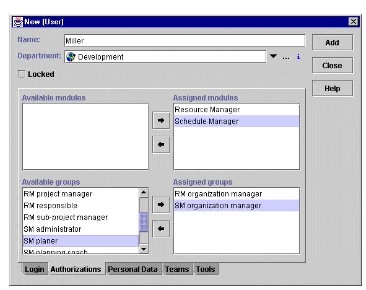


Figure 5: Entering user properties and rights

Switch to the *Authorizations* tab to assign the user to a rights group. In the *Available modules* list highlight the program modules to be made available to the user and click on the arrow button. Then, in the *Available groups* list, select the rights group to be assigned to the user in the same way. You can assign several rights groups to the user at the same time. The user then has the sum total of all rights granted in the groups. You will find a detailed explanation of rights groups in "Authorizations", page 37. TM in the name of a rights group means that the rights group is for the Schedule Manager. RM indicates that the rights group is for the Resource Manager.

Finally, the *Personal Data* tab lets you enter first name, telephone number, fax number and email address. You must specify the e-mail addresses of the users who are to be notified of changes to Synchrolinks and Active Links by e-mail (additional information is available in the RPlan Schedule Manager documentation).

In the *Language* field you specify the language of the RPlan user interface and of automatically generated e-mails. If you set the *System language*, the language in which you last logged in is applicable.

The properties on the Tools tab are enterprise-specific fields defined by your system administrator. They may be mandatory fields which you must fill or optional fields which you may fill or not. You should make any necessary entries.

You save the new user by clicking on *Add*. The dialog box remains open so that you can create additional users. Once you have finished creating users, you exit the dialog box using *Close*.

Users and resources

In RPlan a person can be defined as a user and/or as a resource.

There is a basic distinction between users and resources. Depending on module, users can actively participate in planning. They can also be designated as resources and are therefore available for planning. In contrast, resources are passive and cannot actively participate in planning. They are only available for planning.

This enables external companies, for example, to create, plan and manage resources without having to maintain the resources as users in RPlan.

Specific features of the user and resources icons enable them to be easily identified and distinguished in the structure trees and working views (project view, resource view).

 User

 User and resource available for planning

 User and locked resource (grayed histogram). See also "Locking resources (RM)" on page 21

 Resource, available for planning (grayed head)

 Resource, locked (grayed head and grayed histogram). See also "Locking resources (RM)" on page 21.

Changing user properties

Authorized persons:
- Organization manager
- Administrator

If you want to change the properties of a user, highlight the user in the organization tree with the right mouse button and choose *Properties* → *User* in the context menu. The *User Properties* dialog box opens (Figure 5). Here you can change the properties and rights of the user. Exit the dialog box by clicking on *OK*.

Linking users

Authorized persons:
- Organization manager
- Administrator
- Project manager (open + own department)
- Owner of the team

A user belongs to a department but may also be assigned to one or more project teams (see also "Creating a team", page 11). This can be done when creating the user or when changing user properties by switching to the *Teams* tab in the appropriate dialog box. The list of all teams to which the user is assigned, is shown there (Figure 6). Click on *New* and select the desired team in the organization tree or favorites list. To cancel the link, highlight the link and click on *Remove*.

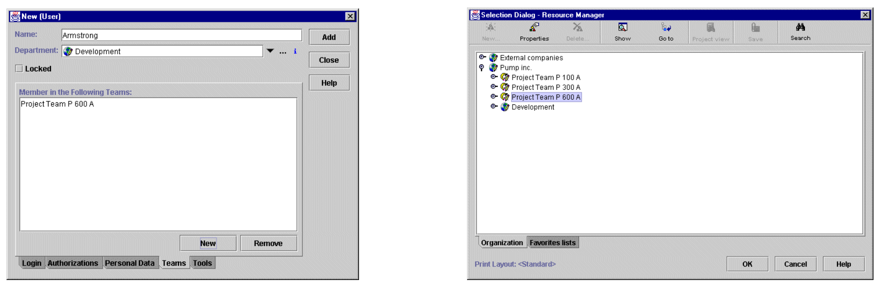


Figure 6: Assigning a user to a team

Deleting a user

Authorized persons:
- Organization manager
- Administrator

When you delete a user, a number of different mechanisms come into play depending on whether the user is defined simply as a user or both as a user and as a resource.

Deleting a user
Highlight the user in the organization tree using the right mouse button and then choose *Delete* in the context menu. Respond with *Yes* to the confirmation prompt. You cannot delete a user only unless all projects, schedules, and organizational units assigned to the user have been deleted or assigned to a different user. Objects are transferred automatically. A number of sample objects which are transferred are listed below:

- Own pools
- Own views if a partner exists
- Own requests and/or approvals
- Own project

Deleting a user defined as a resource
If a user is defined as a resource, you can delete either the user-specific data, the resource-specific data, or the user as a whole.

To delete the user-specific data, highlight the user in the organization tree using the right mouse button and choose *Delete* → *User* in the context menu. Respond with Yes to the confirmation prompt.

To delete the resource-specific data, highlight the user in the organization tree using the right mouse button and choose *Delete* → *Resource*. Respond with Yes to the confirmation prompt.

When you delete a user defined as a resource, RPlan behaves in exactly the same way as when you delete a "normal" user. Highlight the user in the organization tree using the right mouse button and choose *Delete* → *User & Resource*. Respond with Yes to the confirmation prompt. If objects are still assigned to the user, you must delete them or assign them to a different user.

Creating resources (RM)

Authorized persons:

- RM organization manager
- RM administrator

Not only RPlan users but also persons who are not registered users of RPlan can be defined as resources. A working time model, a calendar and a cost rate must be assigned to a resource and the resource must belong to a pool before it can be included in resource planning. In addition, the "available for planning" field must be selected.

You can create a resource in RPlan in one of two ways. You can define an existing user as a resource, or you can define a person as a resource without that person being an RPlan user. The approach is basically the same in both cases.

You make your resource definition entries in the Properties (Resource) dialog box.

1. If you want to define a user as a resource, highlight the user in the organization tree using the right mouse button and choose *Properties* → *Resource* in the context menu.
2. If you want to create a resource that is not a user, highlight the department in which you want to create the resource using the right mouse button and choose *New* → *Resource*.

   The Properties (Resource) dialog box opens in both cases.

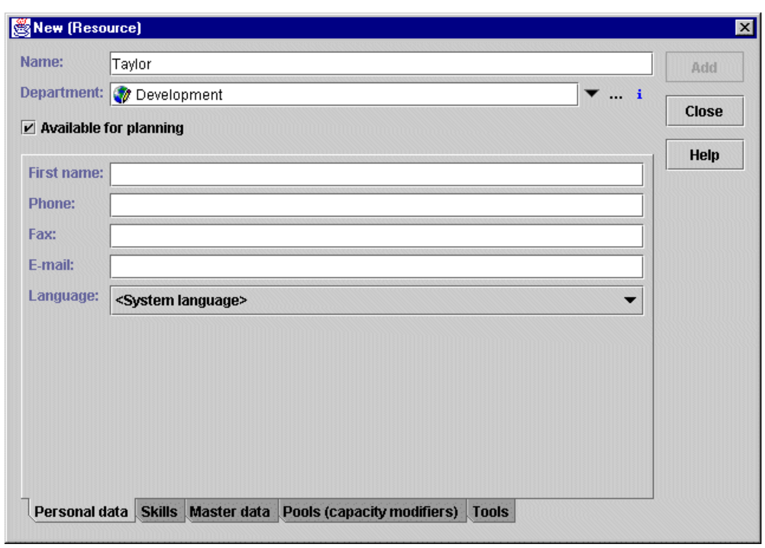


Figure 7: Defining the properties of a resource

If you define an existing user as a resource, the name, department, and personal data fields of the user are already filled. When you create a new resource, you must manually enter the relevant data. The "available for planning" field is selected by default.

3. Switch to the *Skills* tab. Here you can assign skills to the resource. The skills are defined by your system administrator and are grouped into categories. In the *Category* selection list you can select a category whose entries are listed in the *All skills* field. Highlight the skill you want to assign to the resource and click on the arrow pointing to the right.

Gross capacity

In order to plan a resource, it is necessary to define the work capacity available in the resource. The basic factors influencing this capacity are the working time model and the calendar of the resource.

Working time model:

Each resource must be assigned to a working time model via the master data. This model specifies the weekly working hours and a default value indicating how these hours are distributed over each day. If the working hours of a resource change, a different working time model can be assigned to the resource. However, the assigned times must not overlap.

Calendar:

A calendar must be assigned to each resource. The calendar includes the exception days (e.g. public holidays) which reduce the working hours indicated in the working time model.

4. Switch to the *Master data* tab and click on *New*. The *Master Data* dialog box opens.

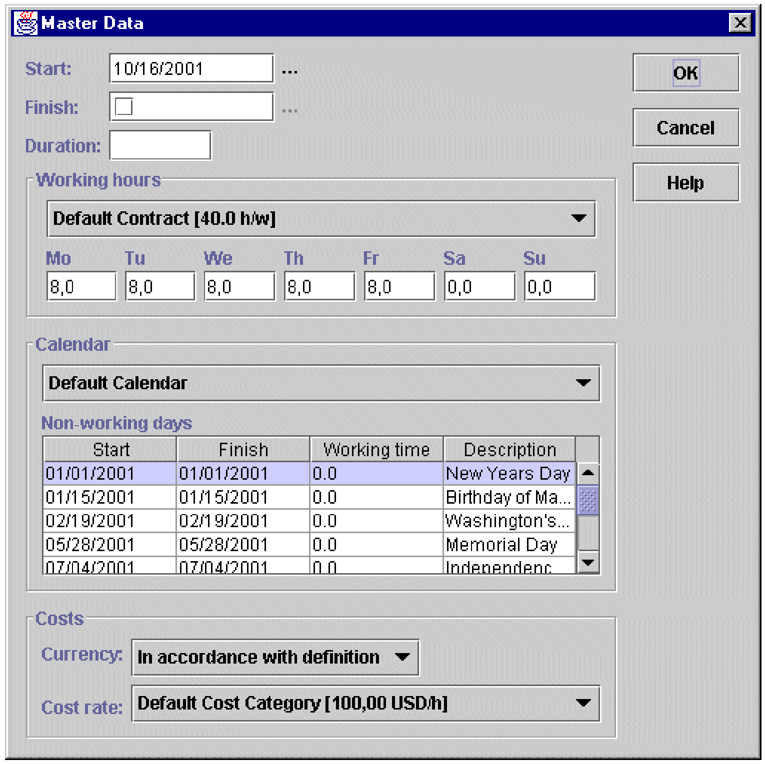


Figure 8: Assigning master data to a resource

The master data of a resource includes the working time model, calendar and cost rate.

5. In the *Working hours* field choose a working time model from the selection list. The working time models are defined by your system administrator. A working time model comprises the weekly working hours and indicates how the hours are spread over the days of the week. In the field for each day of the week you can specify how many hours the individual resource is available for work. However, the total weekly working hours must not be changed.

6. In the *Calendar* field choose a calendar from the selection list. The calendars are defined by your system administrator. The exception days, e.g. public holidays, included in the calendar are shown in the Non-working days area.

7. In the *Cost rate* field choose a cost rate for the resource from the selection list. This allows costs associated with the resource to be reviewed. The cost rates are defined by your system administrator. In the *Currency* selection

list you can choose the currency in which the cost rate is displayed. This is a display function only and the cost rate cannot be changed. The currencies are defined by your system administrator.

A period of validity can be defined only for all master data. In other words, an assigned working time model, calendar and cost rate must all have the same start and finish data. This resource is available for planning and can be assigned to pools only within this period. Further working time models, calendars and cost rates can be assigned to a resource providing the assignment periods do not overlap. The following applies.

- The start date of the first period of validity assigned is freely definable.
- Each period of validity must have a start and a finish date. Exception: The (chronologically) last period of validity may be open-ended.
- The start date of each additional period of validity must be after the (chronologically) last assigned calendar, working time model and cost rate.
- The individual periods of validity need not be adjacent. There may be gaps between them.

At this point you can assign the resource to a pool and assign capacity modifiers to the resource. How you make these assignments is described in the sections entitled "Assigning resources to a pool (RM)" on page 17 and "Assigning capacity modifiers (RM)" on page 19.

The properties on the Tools tab are enterprise-specific fields which the system administrator defines. They may be mandatory fields which you must fill or optional fields which you may fill or not. You should make any necessary entries.

8. Conclude the *Properties (Resource)* dialog by clicking on *OK.*

Assigning resources to a pool (RM)

Authorized persons:

- RM organization manager
- RM administrator

When a resource is assigned to a pool, it becomes the responsibility of the pool owner who can then plan or schedule the resource. A resource cannot be assigned to a pool unless the "available for planning" field is selected.

1. Highlight the resource in the organization tree using the right mouse button and choose *Resource* → *properties* in the context menu. The *Properties (Resource)* dialog box opens. Switch to the *Pools* (*capacity modifiers)* tab and click on *New.* The *Assignment* dialog box opens.

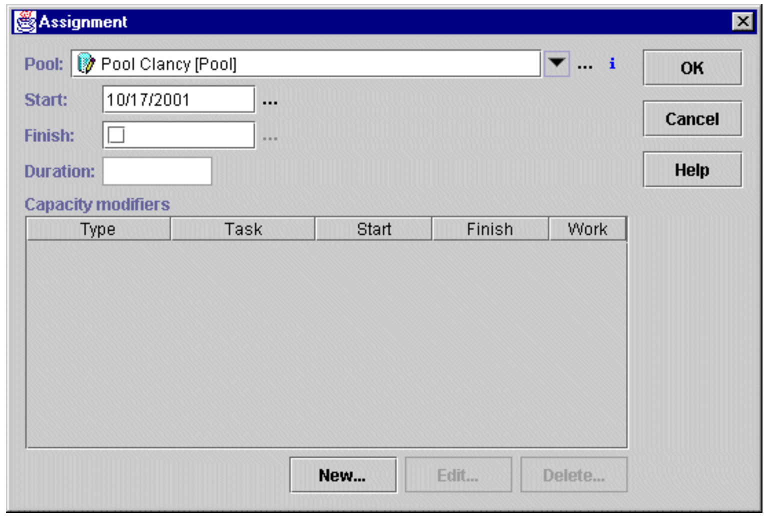


Figure 9: Assigning the resource to a pool

2. Click on the selection button in the *Pool* field and choose a pool in the selection dialog box. By default, the resource is assigned to the pool as of the current date. You can specify a different start date for the request using the selection button in the *Start* field.

3. If you do not want the pool assignment to be open-ended, enter a finish data by selecting the checkbox in the Finish field and typing in the finish date. The assignment is open-ended by default. At this point you can enter capacity modifiers for the pool assignment period. However, you can also do this later if you want (refer to "Assigning capacity modifiers (RM)" on page 19).

   The resource can also be assigned to other pools providing the assignment periods do not overlap. This is to ensure that only one pool is assigned at any one time.

   Confirm your pool assignment by clicking on *OK*.

4. Conclude the *Properties (Resource)* dialog *by* clicking *on OK*.

Pool assignment

You should observe the following rules.

- Each resource must be assigned to a pool to allow the resource to be planned.
- A calendar, a working time model and a cost rate must be assigned to the resource before the resource can be assigned to a pool.
- Each resource can belong to several pools in successive periods (but the periods must not overlap).
- The owner of a resource cannot delete the pool assignment if there are still requests/approvals relating to the resource. If this is the case, the pool assignment can be deleted only by the resource administrator. The requests/approvals are then also deleted.

Assigning capacity modifiers (RM)

Authorized persons:

- RM organization manager
- RM administrator
- Pool owner

The capacity (in terms of time) of a resource is determined by the calendar and working time model associated with the resource. The resource makes this capacity available to the pool to which it is assigned. The capacity available on the basis of the calendar and working time model is known as the gross capacity. Often, however, the gross capacity is not available for assignment to projects because it is affected by capacity modifiers. These are:

- factors which change the gross capacity. They include absences , e.g. vacation or training, which reduce the capacity available to a project. They also include attendance , e.g. overtime, which increase the capacity available.
- non-project workloads that cannot be assigned to a project. They include administrative and routine tasks which require appropriate ongoing capacity.

The two capacity modifiers, *Absence* and *Attendance*, affect the gross capacity and result in the net capacity. The *Non-project workload* capacity modifier does not affect the net capacity because it is not project-specific and results in ongoing utilization of the resource.

You assign capacity modifiers to resources by means of the resource properties.

1. Highlight the resource in the organization tree using the right mouse button and choose *Properties* → *Resource* in the context menu. The *Properties (Resource)* dialog box opens.
2. Switch to the *Pools* tab and highlight the pool assignment to which you want to assign a capacity modifier. Click on *Edit*. The *Assignment* dialog box opens. Click on *New.* The *Capacity Modifiers* dialog box is displayed.

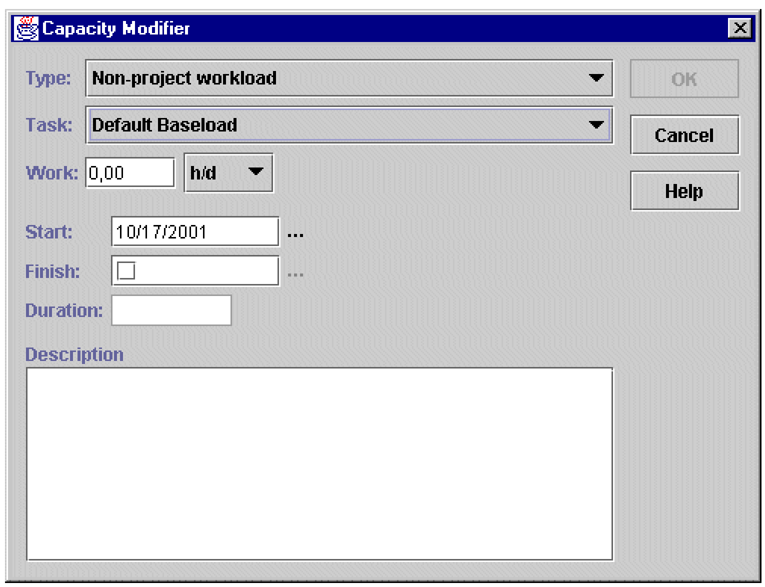


Figure 10: Assigning capacity modifiers to a resource

3. Select the type of capacity modifier. *Attendance* and *Absence* are offset against the gross capacity and so affect the net capacity. *Non-project workloads* do not influence the net capacity and are included as workload in reports.
4. Select a task. The available list is dynamic and depends on the type of capacity modifier. It is defined by your system administrator.

5. In *Work* enter the work quantity (per day) that will modify the capacity of the resource.

   Whole days (for absence only): This field is selected by default. If the resource is absent for whole days, you need not enter any work quantity. This modifier also prevents, for example, overtime being added for the day, thus suggesting temporary presence of the resource. If the resource is absent only for a limited number of hours, deselect this field and enter the work quantity.

   incl. non-working days (for attendance only): If you select this option, additional attendance is added to any free days.

6. Enter a start and, if desired, a finish date for the assignment of the capacity modifier to the resource. The finish date can be left blank if pool assignment is to be open-ended.
7. If desired, add information on the *Capacity modifier* in the *Description* field and confirm by clicking on *OK*.

Editing resources (RM)

Authorized persons:

Editing of all properties:

- RM organization manager
- RM administrator

Editing only of role, skills, pool assignment, capacity modifiers:

- Resource supervisor

To edit the properties of a resource, you proceed in the same way as when creating the resource:

Highlight the resource in the organization tree using the right mouse button and choose *Properties* → *Resource* in the context menu. The *Properties (Resource)* dialog box opens for the selected user. Make the desired changes in this dialog box.

Planning level

In resource-specific planning each resource can be requested or approved individually.

In spool-specific planning only a certain work quantity can be requested from the pool

Editing resources

You should observe the following rules in addition to those described above.

Changing the assignment period for a pool:

- In resource-specific planning all existing approvals and capacity modifiers that are no longer within the assignment period are deleted.
- In pool-specific planning all requests and approvals are retained because they relate not to the resources but exclusively to the pool. The capacity modifiers of the resource that are no longer within the assignment period as a result of the change are deleted.

Changing master data and associated assignment period

Working time model, calendar and cost rate always have a common assignment period. If the assignment period is changed, this always affects the period of validity of the working time model, calendar and cost rate.

The working time model, calendar and cost rate taken together with their common assignment time form a master data record.

Within an assignment period the working time model, calendar and cost rate can be changed independently of each other. For example, in assignment period A you can replace calendar 1 with calendar 2 without affecting the working time model or the cost rate. If the assignment period is changed, the change applies for the working time model, calendar and cost rate.

Assignment periods of master data records must not overlap. An assignment period may be added only to the (chronologically) last assignment period. The (chronologically) last assignment period may be open-ended.

Locking resources (RM)

Authorized persons:

- RM organization manager
- RM administrator

You lock a resource by deselecting the "available for planning" field. As a result, the resource can no longer be included in resource planning.

To deactivate a resource, highlight the resource in the organization tree using the right mouse button and choose *Properties* → *Resource* in the context menu. The *Properties (Resource)* dialog box opens for the selected user. Deselect the *Available for planning* field by clicking on it and confirm by clicking on *OK*. This does not affect pool affiliation. Neither does locking a resource have any effect on the master data.

When a resource is unlocked, it is immediately available for planning again.

Deleting resources

Different mechanisms come into play when you delete a resource, just as when you delete users.

Deleting resources
Highlight the resource in the organization tree using the right mouse button and choose Delete in the context menu. Respond with Yes to the confirmation prompt. All assigned objects (e.g. master data, requests, approvals) are also deleted.

Deleting the resource property of a user
Highlight the user in the organization tree using the right mouse button and choose Delete → Resource in the context menu. The resource-specific data is deleted. The user remains in RPlan as a "normal" user and can continue to actively participate in planning.

Creating pools (RM)

Authorized persons:

- RM organization manager
- RM administrator

To create a new pool, click with the right mouse button on the department in the organization tree below which you want to insert the pool. Choose *New* → *Pool* in the context menu. The *New (Pool)* dialog box opens.

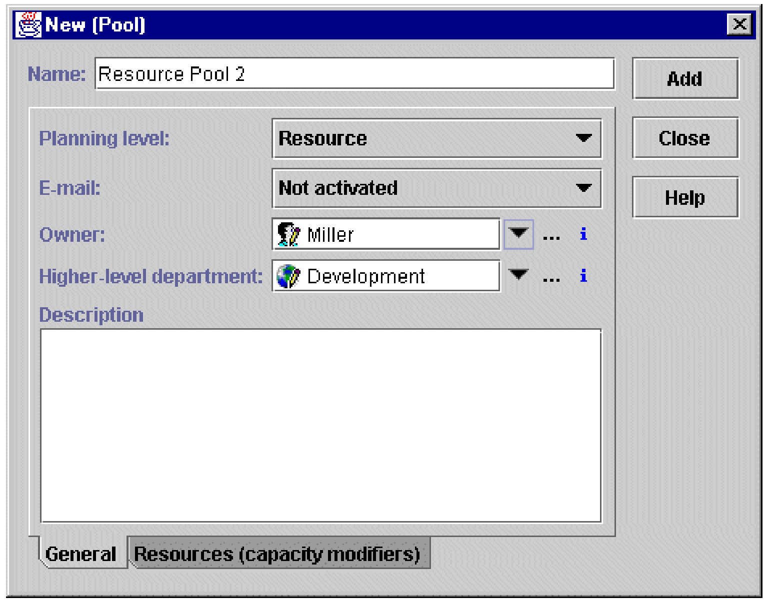


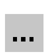
Figure 11: Defining the properties of a pool

Enter a name for the pool in the *Name* field and, if necessary, a short description in *Description.*

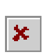
Define a planning level for the pool . This determines on what level of detail the pool resources are available for planning. You cannot subsequently change the planning level. A distinction is made between the following planning levels.

- **Resource:** Each resource assigned to the pool can be requested and approved individually.
- **Pool:** Only a specific work quantity can be requested and approved as a whole in the pool.

In the E-mail field you can specify whether the owner is to be notified automatically by e-mail of changes to schedules for which the owner's pool or pool resource has been requested or approved (cf. RPlan Resource Manager documentation). You can select the schedule-related or activity-related option. If you select the schedule-related option, the owner is notified only of the schedules in which changes have been made. If you select the activity-related option, the owner is provided with detailed information on changes to Synchrolinks or Active Links and on activities. (cf. RPlan Schedule Manager documentation).



Your own name is preset as *Owner.* To assign the pool to a different user, click on the selection button in the *Owner* field. In the selection dialog box you can now select a user in the organization tree who is to be the owner of the new pool. Highlight the name of the user and click on *OK.*



Higher-level department indicates the department you selected beforehand. You can choose a different department using the selection button. To create a department on the top level of the tree, you must delete the higher-level department using the *Delete* button.

Click on *Add* to complete creation of the new pool. The *New (Pool)* dialog box remains open for further input so that you can continue to create additional pools if required. Click on *Close* once you have created all the pools you need.

Changing pool properties (RM)

Authorized persons:
For all pools:
- RM organization manager
- RM administrator

Only as owner:
- RM project manager
- RM sub-project manager
- RM planner
- RM supervisor
- RM coach

To change the properties of a pool, highlight the pool in the organization tree using the right mouse button. Choose *Properties* in the context menu. A dialog box showing the pool properties opens.
Make the desired changes and click on *OK* to apply them.

Assigning resources to a pool (RM)

Authorized persons:
For all pools:
- RM organization manager
- RM administrator

Only as owner:
- RM project manager
- RM sub-project manager
- RM planner
- RM supervisor
- RM coach

Pool assignment

You can edit the assignment of resources to pools by means of the resource properties (see "Assigning resources to a pool (RM)" on page 17) or using pool properties.

You can assign resources to a pool when you create a pool or change the properties of a pool. Note also that resources can be switched to a different pool. However, a resource may be assigned to only one pool at any one time.

1. Open the *Properties (Pool)* dialog box and switch to the *Resources (capacity modifiers)* tab. This tab contains a list of all resources that belong to the pool and their assignment periods.
2. Click on *New*. The *Assignment* dialog box opens.
3. Click on the selection button of the *Resource* field and choose a resource in the organization tree.
4. Enter a start date indicating as of when the resource belongs to the pool. The finish date can be left blank providing the resource is not already assigned to a different pool at a later date.
5. If necessary, click on *New* in the *Capacity modifiers* area in order to define the capacity modifiers for the resource (cf. "Assigning capacity modifiers (RM)" on page 19).
6. Confirm your input by clicking on *OK*.

Editing pool assignments
To change the assignment data of a resource, highlight the resource on the *Resources* tab and click on the *Edit* button. Then change the start and/or finish date in the *Assignment* dialog box.

To delete the pool assignment of a resource, highlight the resource on the *Resources* tab and click on the *Delete* button.

Note the following when deleting assignment data.

- In resource-specific planning all existing requests/approvals and capacity modifiers that are no longer within the assignment period are deleted.
- In pool-specific planning all requests and approvals are retained because they relate not to the resources but exclusively to the pool. The capacity modifiers of the resource that are no longer within the assignment period as a result of the change are deleted.

Deleting pools (RM)

Authorized persons:

For all pools:

- RM organization manager
- RM administrator

Only as owner:

- RM project manager
- RM sub-project manager
- RM planner
- RM supervisor
- RM coach

A pool can be deleted by authorized persons if it no longer contains any resources. Highlight the pool you want to delete using the right mouse button and choose *Delete* in the context menu. Respond to the confirmation prompt by clicking on *OK*.

Project structure

Open the *Selection* dialog by means of *File* → *Open*. To make changes to the project structure, expand the project tree by double-clicking on the desired projects.

Icons used in the project tree

The icons in the project tree have the following meanings:

- Project
- Resource project
- Schedule with real-world planning
- Schedule with scenario planning
- Schedule linked with a different project
- Schedule
- Own object

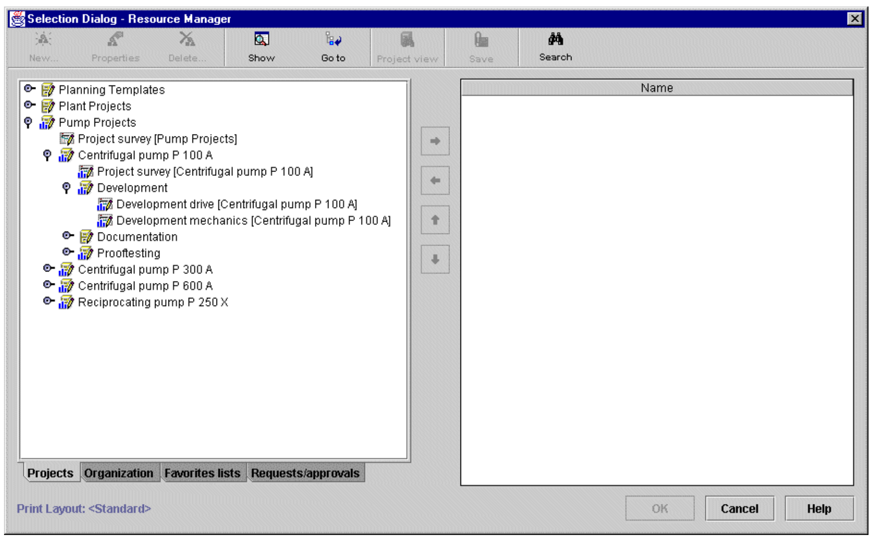


Figure 12: The project structure tree in RPlan administration

Improved overview in the project tree

To improve the overview of the project tree you are able to modify how it is displayed. Click with the right mouse button in the window and choose *View* in the context menu.

- **As Root** restricts the view to a subtree. The project structure below the highlighted object is displayed.
- **Whole Tree** redisplays the complete project structure again.
- **Projects Only** hides all schedules so that only the projects are visible.

Creating a project

Authorized persons:

- Administrator
- Project manager
- Manager of sub-projects (under own + released projects)

To create a new project, highlight the project under which the new project is to be positioned, e.g. "Centrifugal pump P 600 A" using the right mouse button. Choose *New* → *Project* in the context menu.

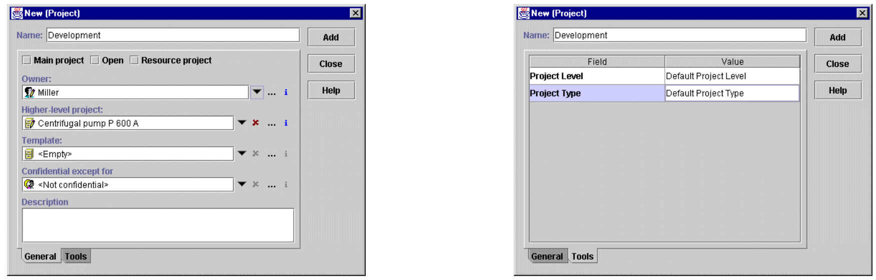


Figure 13: Entering project properties

In the *New (Project)* dialog box (Figure 13) you enter the name of a project. The options listed below can be set for each project.

Create the project using *Add*. The *New (project)* dialog box remains open so that you can add additional projects if necessary. Click on *Close* if you no longer want to create any additional projects.

Main project

If you select the *Main project* option for a project, the name of main project is shown in parentheses next to each schedule created below the project in the project tree, e.g.

Project survey (Reciprocating pump P 250 X)

Project survey (Centrifugal pump P 100 A).

This ensures that every schedule is unique and there is no need to take special care when naming schedules (Figure 14).

There is no restriction on the number of main projects, even within a branch. New schedules are assigned to the main project on the next level up in the hierarchy.

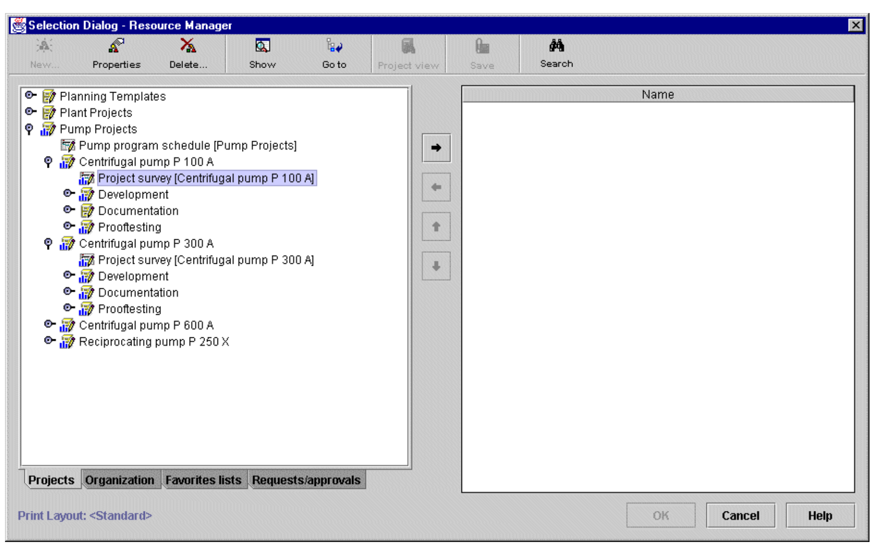


Figure 14: Both schedules named "Project survey" are assigned to unique main projects (Centrifugal pump P 100 A and Centrifugal pump 300 A).

Open

Selecting the *Open* option releases projects for further sub-division. In this case, *Sub-project managers* (see also "SM sub-project managers", page 38) may create sub-projects within these projects. In turn, the sub-project managers can specify whether their projects are to be released for the next level down, and so on. *Planners* are not permitted to create projects – not even in open projects.

Resource project

You identify a project as a resource project by activating the *Resource project* option. You can assign the attribute 'resource planning' to the schedules of a resource project. Only then can resources be planned for the schedules.

Only users with resource project manager rights, resource administrator rights or resource coach rights are permitted to define a project as a resource project. A resource project definition can only be withdrawn if no resource schedules with real-world resource planning are assigned to the project.

Owner

Your own name is preset as owner. If you want to assign the project to a different user, click on the *Selection* button in the *Owner* field. Choose the desired person in the organization tree and click on *OK*.

Owner of a project

The owner of a project is authorized to delete his/her own projects, change project properties, create schedules in the projects (see also "Creating a schedule", page 28) and link schedules to the project (see also "Linking schedules", page 30).

Higher-level project

Click on the *Select* button in the *Higher-level project* field if the new project is to be positioned under a different project than the one highlighted beforehand. Select the desired project in the project tree and click on *OK*. To create a project on the top level of the tree, you must first delete the *Higher-Level Project* using the *Delete* button.

Template

If a new project has similar contents to an existing project, you can choose the existing project as a reference using *Template*. The complete tree of the original project is copied to the new project. You need only modify the project to suit the new circumstances. All projects and schedules in the new project branch are assigned the same owner. The enterprise-specific fields of the template are transferred to the copied project, Synchrolinks and Active Links are not.

Cross-schedule links

When you copy a tree structure, only the Autolinks (links within a schedule) are retained. By contrast, all cross-schedule links, i.e. Synchrolinks and Active Links (see also "Actively networking projects" in the documentation RPlan Schedule Manager) are deleted as the program cannot determine whether it is advisable to retain them or not.

The following setting options are available to you on the *Tools* tab:

Confidential projects

...

For projects requiring confidentiality, click on the *Tools* tab and then on the *Selection* button in the *Confidential Except For* field. In the organization structure, choose the authorized project team and confirm with *OK*. It is not possible to select individual users. Only the members of the selected project team can see the project in the project structure. Confidential projects are invisible to all other users.

Description

You can enter a brief description of the project in this field.

Enterprise-specific fields

Your system administrator can define enterprise-specific properties for projects. You can then assign them to projects on the Tools tab. The properties are grouped into categories. The categories are shown in the List field on the tab. The Value list contains the properties for the categories.

Properties have been defined for some categories by the system administrator. You can choose these in selection lists. For other categories you are required to make your own input.

You should contact your system administrator if you need more information on project categories and their properties.

If you click on a line in the Value list and a selection list appears, you can choose a property from the list. Otherwise you must double-click in the line in order to enter a property yourself.

Use *Add* to create the project. The *New (Project)* dialog box remains open for further input so that you can continue to create additional projects if required. Click on *Close* once you have created all the projects you need.

Changing project properties

Authorized persons:

- Administrator
- Owner

To change the properties of a project, highlight the project in the project tree with the right mouse button and choose *Properties* in the context menu. A dialog box showing all the project properties is opened. Proceed in the same way as in the *Create* dialog box (Figure 13). Confirm with *OK* to accept your changes.

Deleting a project

Authorized persons:

- Administrator
- Owner

A project can be deleted by its owner provided it no longer contains any lower-level projects nor any schedules. Highlight the project you want to delete, click on *Delete* and respond with *Yes* to the confirmation prompt.

As an administrator you are authorized to delete projects which also contain project elements. Exceptions to this rule are projects where Active Links or requests/approvals are still present.

Creating a schedule

Authorized persons:

To create schedules using the project tree:

- Administrator
- Planning coach
- Owner of the project

To create schedules using the organization tree:

- Anyone (but only without project links)

To create a new schedule, first highlight the project under which it is to be positioned or – using the organization tree – highlight your own name using the right mouse button. In the context menu you then choose *New* → *Schedule*. The dialog box shown in Figure 15 opens.

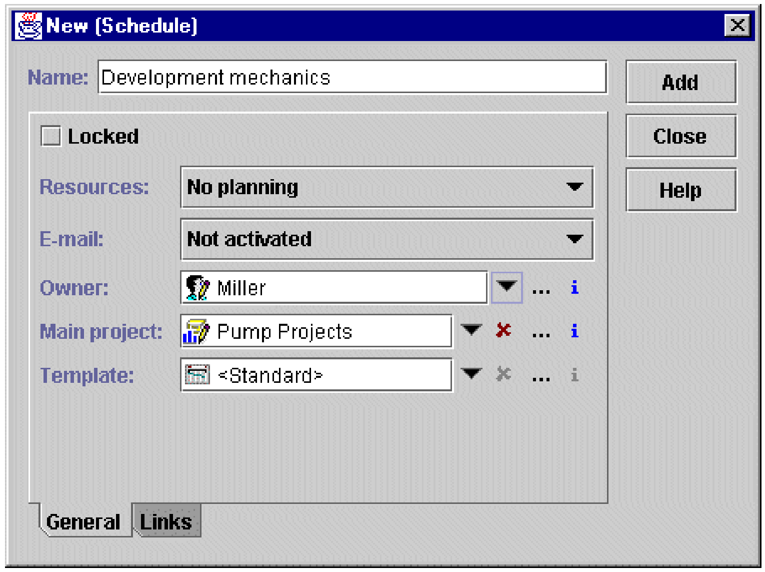


Figure 15: Creating a schedule

Enter the name of the new schedule in the *Name* field.

Locked

Select *Locked* here if the schedule is not sufficiently complete and cannot therefore be made accessible to those who would have to rely on it.

Once revision of the schedule has been completed, it can be released using the *Properties* dialog box (Figure 15).

In the **Resources** field specify whether the schedule is to be used for resource planning.

- **Real-word planning:** The schedule is fully integrated into resource planning (can only be selected by users with resource project manager or resource sub-project manager rights for their own schedules, and generally by users with resource administrator or resource coach rights). Request can be made and approvals granted.
- **Scenario planning:** If this attribute is assigned, the schedule can be used by its owner for the trial planning of resources. In other words, only requests can be made. These are not forwarded to the resource supervisor and cannot be approved. Scenario planning does not affect the utilization dates of the assigned resources (can only be selected by users with resource project manager, resource sub-project manager, resource planner, or resource supervisor rights for their own schedules, and generally by users with resource administrator or resource coach rights)
- **No resources:** The schedule cannot be used for resource planning (can only be selected by users who have one of the rights for resource planning or scenario planning)

Resource schedule properties

The following rules should be observed when editing schedules with the *resource* property.

- The *Real-world planning* attribute can only be set if the schedule is positioned directly below a resource project.

- The Scenario *planning* attribute can be set even if the schedule is not positioned directly below a resource project.
- The *Real-world planning* attribute of a schedule cannot be reset to Scenario *planning* because requests/approvals may exist for the schedule.
- Whether the *Resource planning* attribute can be changed to *No resources* depends on whether there are requests/approvals and on authorization rights. If there are no request/approvals, the resource manager/planner is authorized to change the schedule to *No resources.* If, however, there are requests/approvals for schedule activities, only the resource administrator and resource coach are authorized to change the attribute to *No resources.* In this case, all requests and approvals are deleted.

In the **E-mail** field you can specify whether the owner is to be automatically informed by e-mail of changes to Synchrolinks and Active Links. You can select either the *Schedule-related* or *Activity-related* option.
If you select *Schedule-related*, the owner is informed only of the schedules in which changes have occurred.
If you select *Activity-related*, the owner is provided with detailed information on changes to Synchrolinks or Active Links and to activities. (cf. "Administration" manual).

You own name is preset in the **Owner** field. You can, however, click on the selection button to switch to the organization tree and assign the schedule to a different owner.

The main project one level higher in the tree hierarchy is preset as the main project. However, you can assign any other project using the *Selection* button in **Main Project** (even if the project does not have the property of a main project, see also "Creating a project", page 25).

Click on *Add* to save the new schedule and on *Close* if you no longer want to create any additional schedules.

Template

Often it is necessary to create new schedules which are similar to existing schedules. For example, the project entitled "Development mechanics" for pump P 600 A corresponds to that for P 300 A but with different dates.

When you create the schedule for P 600 A, click on the *Selection* button ... in the *Template* field and choose the schedule P 300 A in the project tree. The schedule is then already filled with the P 300 A data which you must then modify for the new pump. The settings in the *E-mail* field are not copied. Synchrolinks and Active Links and links to other projects are deleted.

If the template is a resource schedule, you can copy existing requests. The new schedule is assigned the "scenario planning" attribute.

Changing schedule properties

Authorized persons:

- Administrator
- Planning coach
- Owner

To change the properties of a schedule, highlight the schedule with the right mouse button and choose *Properties* in the context menu. A dialog box showing all the schedule properties opens. Proceed in the same way as in the *Create* dialog box (Figure 15). Confirm with *OK* to accept the changes.

Linking schedules

Authorized persons:

To link all schedules with all projects:

- Administrator
- Project manager

To link all schedules with own projects:

- Sub-project manager
- Planning coach
- Planner

A schedule is automatically linked with the project under which it was created. This is its main link . However, the schedule can be assigned to several projects at the same time; for example, if an identical intake tube is to be developed for two pump types. The schedule is thus linked with the two pump projects. There is only one schedule but it can be accessed from both projects.

A schedule can be linked to one or more projects when it is created or when its properties are changed. To do this, switch to the *Links* tab in the appropriate dialog box. This contains a list of all projects to which the schedule is already linked (Figure 16). The main link is identified by a check mark. Click on *New* and select the desired project in the project tree. To cancel the link to a project, highlight the project and click on *Remove*.

Main project vs. main link

The next higher project with the *main project* property in the tree structure is assigned to a schedule when the schedule is created (see "Creating a project" on page 25). This defines where the schedule belongs in the project structure. The name of the main project appears in parentheses next to the name of the schedule.

The link to the project under which a schedule is created is the main link. The project need not be a main project.

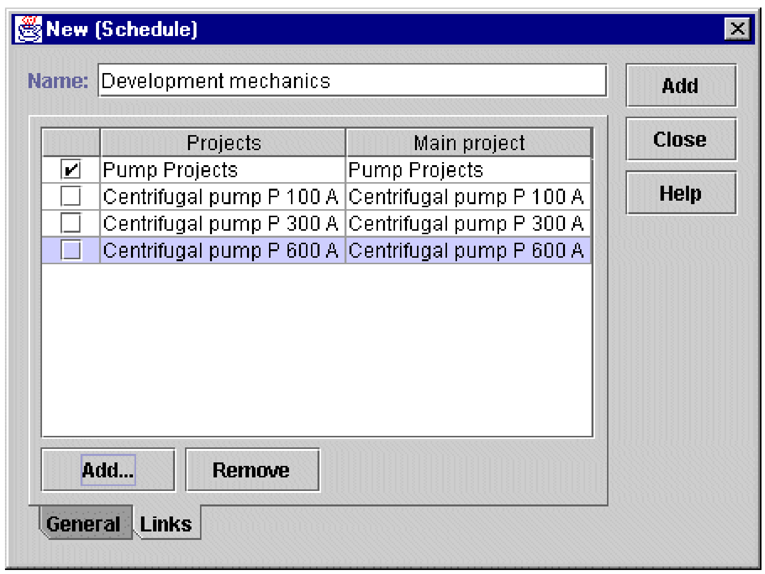


Figure 16: The *Links* tab

The main link for a (time) schedule and resource schedule with the *scenario planning* attribute can be changed as required. All you need do is click in the check mark column of the future main link. The previous main link becomes a simple link.

The main link for a resource schedule with the *real-world planning* attribute can be changed only if the new main link is a resource project.

Deleting a schedule

Authorized persons:

- Administrator
- Planning coach
- Owner

To delete a schedule from RPlan administration, you highlight the schedule in the project structure tree with the right mouse button and choose *Delete Schedule* in the context menu. You are now offered three delete options.

Links

For information on the links of a schedule refer to "Linking schedules" on page 30.

Only selected link

Deletes only the highlighted link. The schedule itself and all links to other projects are retained.

All links

Schedule: All links with projects are deleted. The schedule itself is retained. However, it can only be accessed via the owner in the organization tree.

Resource schedule: In the case of a resource schedule with the *real-world planning* attribute, all links except the main link are deleted. If the schedule has the sc*enario planning* attribute, the main link is also deleted.

Schedule and all links

Schedule: The schedule and all its Active Links (see also "Project-wide coordination – Active Links" in the documentation RPlan Schedule Manager) and Synchrolinks (see also "Synchrolinks" in the documentation RPlan Schedule Manager) are deleted.

Resource schedule: In the case of a resource schedule, all requests and approvals for the schedule activities are also deleted. The resource administrator and resource coach have the necessary rights. If no approvals are present, the owner is also authorized to delete the schedule.

History lists

A history list containing objects last used is kept for the object types shown below.

- Projects
- Schedules
- Departments
- Users / resources
- Pools
- Teams
- Favorites lists

Objects are added to the history list when they are created or edited, or when their properties are displayed and the Properties dialog box is subsequently confirmed.

Each list may contain up to nine objects. When a list is full, the oldest object is removed from the list and the latest object is added. A separate history list is saved for each user so that the objects you last used are shown in the list unless a different user has deleted one or more of the objects in your list in the meantime.

When you first install a system, the history lists are empty and cannot be selected. They are gradually filled as you work with the different object types.

History lists in the project tree

History lists are created for projects and schedules in the project tree. The figure below shows an example of an opened history list of projects last used.

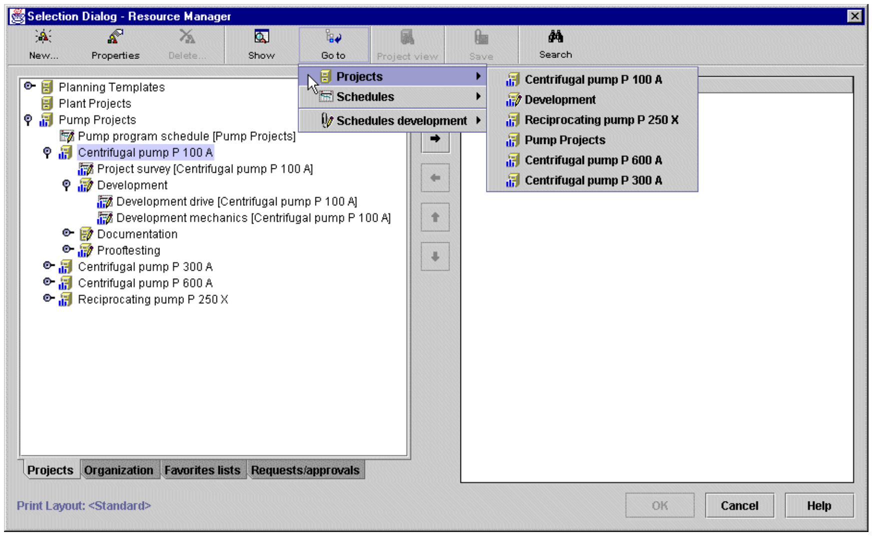


Figure 17: History list in the project tree

In the project tree only favorites lists in which (resource) schedules are grouped together are displayed. You see the favorites lists of which you are the owner or partner.

History lists in the organization tree

In the organization tree history lists are created for departments, users/resources, pools and teams, and in turn, for schedules. The figure below shows an example of an opened history list of users/pools last used.

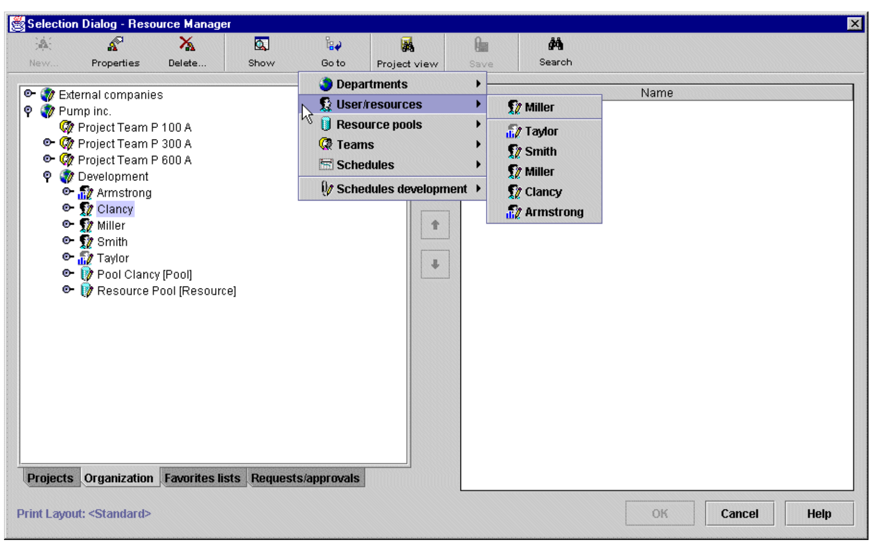


Figure 18: History list in the organization tree

The history list of users/resources always starts with the name of the user logged in to RPlan.

In the organization tree not only favorites lists in which schedules are grouped together are shown but also favorites lists containing resource objects. You see the favorites lists of which you are the owner or partner.

Access to the history lists
You access the history lists using the *Go to* function in the selection dialog box or by means of context-sensitive lists buttons in the various dialog boxes.

History lists functions

The history lists let you go directly to an object in the structure tree or let you choose an object for a corresponding object field in a dialog box.

The Go to function lets you branch to different destinations in the organization or project tree. When you are using complex, multi-level structure trees, it is easier to branch to the object you want from the history list rather than manually expanding several sub-trees. In addition, you can branch directly from an object found in a search to the object in the organization or project tree.

Proceed as follows when selecting destinations:

1. Display the project or organization tree.
2. Click on the Go to icon and position the mouse cursor on the desired history list and then on the object to which you want to branch. Click on the object to display it in the structure tree.

The history lists are available using not only the *Go to* function in the selection dialog but also by means of context-sensitive lists buttons in the various dialog boxes. If a dialog box contains an object type which is saved in a history list, you can open the history list using the lists button and choose an object in the list. The lists offer a further access option to supplement the selection button.

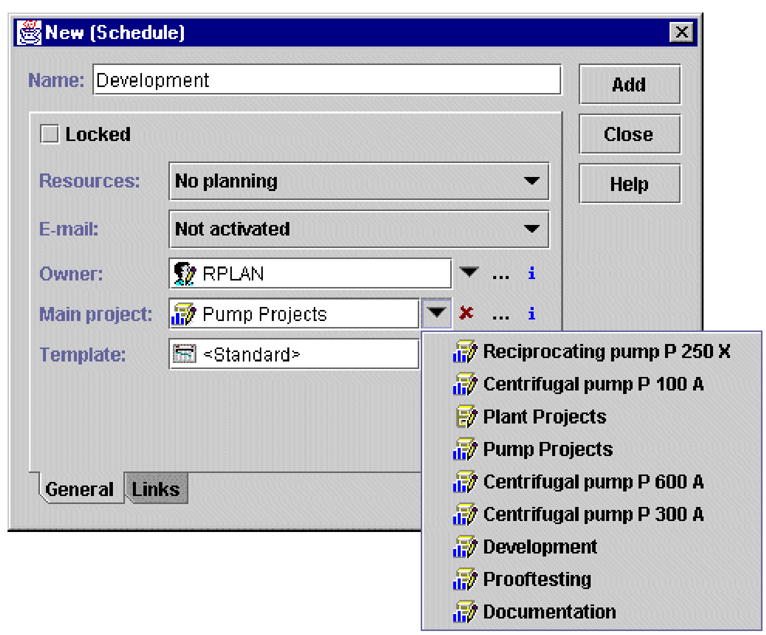


Figure 19: History list in a dialog box

Sorting objects in dialog boxes

You can sort lists in dialog boxes that you have opened from within the selection dialog box. You can sort the list on the contents of each column. In the example below the list of resources assigned to the pool can be sorted on the name or on the start or finish date of the assignment.

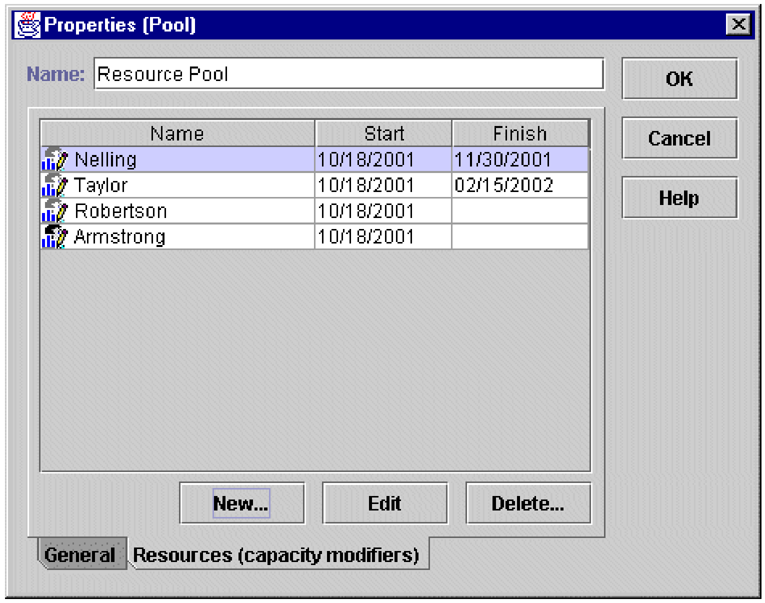


Figure 20: Unsorted objects

Click on the 'Name' cell.

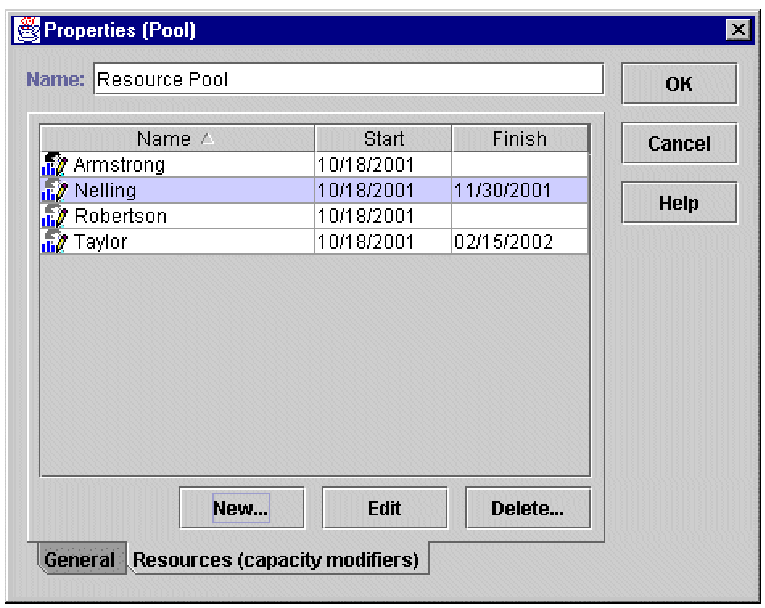


Figure 21: Sorted objects

The name column is then sorted in ascending order. Click on the same cell again to sort the column in descending order. The arrow next to the name of the cell indicates the sort direction. You can sort the contents of the other columns in the same way.

Searching in the database

This function lets you search for specific contents in the database. You thus have rapid access to desired data in complex, comprehensive project and organization structure trees.

Open the selection dialog box by choosing *File* → *Open* and click on the *Search* button on the toolbar.

The *Search* dialog box is displayed.

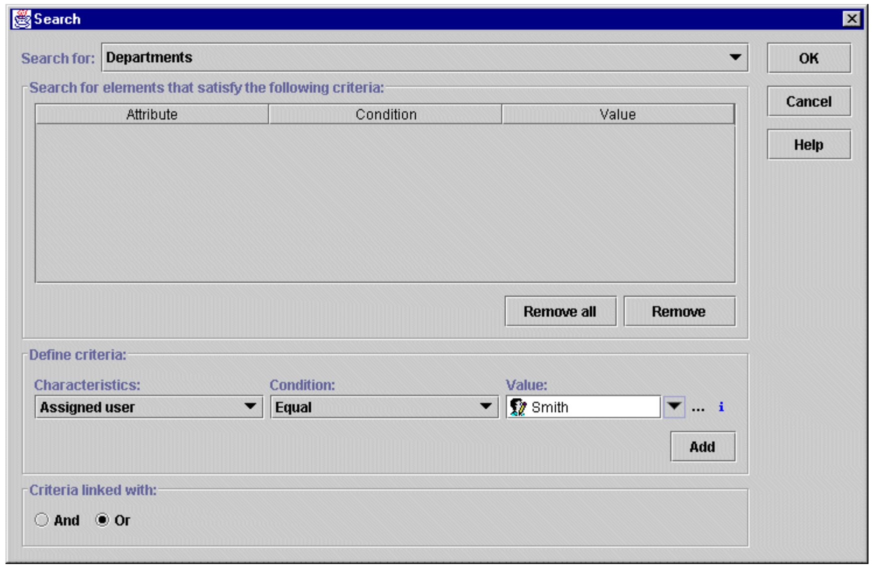


Figure 22: The *Search* dialog box

In *Search for* select the element you want to find in the selection list.

In the Define criteria area specify the criteria to be used when searching for the desired element.

- **Attribute**: The criteria displayed in this list vary depending on the element you want to find. They also depend on the rights you have.
- **Condition**: You can specify a condition for the attribute you have selected. Again, the conditions available depend on the selected attribute.
- **Value:** Here you specify the value the found attribute must have. The behavior of this field varies according to the selected attribute and condition. You can type in an entry, choose an entry using the selection button, or select an entry from a displayed list.

And/Or linking

The criteria in the list are combined in different ways depending on what type of linking you choose.

If you choose *Or,* a search is made for all elements that satisfy one of the criteria.

If you choose *And,* a search is made for elements that satisfy all of the selected criteria.

Criteria linked with: The criteria you have added to the search list can be linked using the operators *Or* or *And*.

Once you have defined a criterion, click on *Add* to include it in the list of search criteria. You may add several criteria to the list.

To delete a single criterion from the list, highlight it and click on *Remove*. If you want to delete all criteria from the list, click on *Remove all*.

When the list is complete, click on *OK* to start the search.

The result of your search is displayed on the *Search result* tab in the selection dialog box. If the search produces no result, you are informed accordingly.

The result of your search is displayed on the Search result tab in the selection dialog box. If the search produced no result, you are informed accordingly by means of a message.

Selecting criteria in the *Search* dialog box

You can search for the following elements.

- Departments
- Favorites lists
- User/resources
- Schedules
- Pools
- Projects
- Teams

For some attributes a list is displayed in the *Value* field. Some of the entries in this list are data entered by the administrator when setting up RPlan (e.g. user-defined properties of a project).

To change a criterion that has already been added to the list of criteria, highlight the criterion and click on *Remove.* The criterion then appears in the *Define criteria* field. Change the criterion in this field and choose *Add* again.

Search result

If your search is successful, the *Search result* tab listing the results is displayed in the selection dialog box.

On this tab you can move elements, such as schedules, into the view window using the arrow pointing to the right and open them there.

If you want to branch to the corresponding position in the project or organization tree, highlight the desired element using the right mouse button and choose *Go to* projects or *Go to* → *Organization* in the context menu.

Authorizations

The preceding sections described the procedures involved in RPlan administration and indicated which user groups are authorized to perform the relevant actions described. Below you will find an explanation of the predefined user groups with a detailed overview of their rights. Rights are assigned to one or more user groups when the users are created (see also "Creating a user", page 12) or when user properties are changed (see also "Changing user properties", page 14).

SM project managers

Each project manager has extensive rights in the entire project structure tree and limited rights in the organization tree. Persons who are responsible for the structure of a project are given project manager status. Generally, the same persons are also responsible for project content.

Project managers are able to release individual projects (page 25) so that members of the *sub-project manager* rights groups can assume responsibility for structuring sub-projects. By contrast, the structure of non-released projects is decided exclusively by the project manager.

Project managers are authorized to

- see all projects and schedules (unless they are excluded for reasons of confidentiality),
- create projects and schedules at any position in the project tree (page 25),
- change the properties of their *own* projects and schedules (page 27, 30),
- delete *own* projects and schedules (page 27, 31),
- link any schedules to any projects (page 30),
- create new teams in open departments and in their own departments (page 10),
- change the properties of their *own* teams (page 12),
- delete teams of which they are the owner (page 12) and
- link users to their *own* teams and to open teams (page 14).

RM project managers

Resource project managers have the same rights as project managers and are also authorized to

- change their own projects into resource projects
- change their own schedules into resource schedules
- assign, edit and delete skills for resources in their own pools
- edit the roles of resources in their own pools
- generate pools below open departments
- edit and delete their own pools
- assign, edit and delete requests relating to their own schedules, approvals relating to their own pools, and resources in their own pools.

SM sub-project managers

Sub-project managers are responsible for the structure of projects released by a project manager (see also page 25). On the level below the released project in the project tree they have the same rights as a project leader. On the level above the released project they have the rights of a planner.

Sub-project managers are authorized to

- see all projects and schedules (unless they are excluded for reasons of confidentiality),
- create projects in their *own* projects and in open projects (page 25),
- create schedules in their *own* projects (page 28),
- change the properties of their *own* projects and schedules (page 27, 30),
- delete projects and schedules of which they are the owner (page 27, 31) and
- link any schedules to their own projects (page 30).

RM sub-project managers

Resource sub-project managers have the same rights as sub-project managers and are also authorized to

- change their own projects into resource projects
- change their own schedules into resource schedules
- assign, edit and delete skills for resources in their own pools
- edit the roles of resources in their own pools
- edit and delete their own pools
- assign, edit and delete requests relating to their own schedules, approvals relating to their own pools, and resources in their own pools.

SM planners

The majority of RPlan users are given the status of a planner. Planners have no influence on the project structure or organization structure.

A planner can be assigned as the owner of one or more projects. Only in these projects is the planner allowed to create schedules and edit contents. Planners are not permitted to create any new projects.

Planners are authorized to

- see all projects and schedules (unless they are excluded for reasons of confidentiality),
- change the properties of their *own* projects (page 27),
- delete *own* projects (page 27),
- create schedules in their *own* projects (page 28),
- change the properties of their *own* schedules (page 30),
- delete *own* schedules (page 31) and
- link any schedules to their *own* projects (page 30).

RM planners

Resource planners have the same rights as planners and are also authorized to

- change their own schedules into resource schedules with scenario planning
- assign, edit and delete skills for resources in their own pools
- edit the roles of resources in their own pools
- edit and delete their own pools
- assign, edit and delete requests relating to their own schedules, approvals relating to their own pools, and resources in their own pools.

Caution

You should only log in as planning coach if there is a need to edit someone else's schedules. As planning coach you cannot recognize which schedules belong to someone else when you are in the working view.

SM planning coaches

Planning coaches are responsible for maintaining schedules during team planning sessions. They enter planning data for all participants so that the plausibility of the data can be monitored online. For this purpose, they are authorized to modify the contents of *foreign* schedules.

Planning coaches are authorized to

- see all projects and schedules (unless they are excluded for reasons of confidentiality),
- create schedules in *all* projects (page 28),
- change the properties of *all* schedules (page 30),
- work in *all* schedules,
- delete schedules (page 31) and
- link any schedules to *own* projects (page 30).

RM coaches

Resource coaches are authorized to

- change projects to resource projects
- change schedules to resource schedules
- create and deactivate resources and to edit the resource type
- assign, edit and delete working time models
- assign, edit and delete calendars
- assign, edit and delete skills for resources in their own pools
- edit the roles of resources in their own pools
- edit and delete their own pools
- assign, edit and delete requests and approvals.

SM organization managers

Organization managers are responsible exclusively for the organization structure tree. They create teams, departments and users, assign rights to users and link them to project teams.

Organization managers are authorized to

- see all projects and schedules (unless they are excluded for reasons of confidentiality),
- create new departments and teams (page 10),
- change the properties of *all* departments and teams (page 12),
- delete departments and teams (page 12),
- create new users (except administrators) (page 12),
- change the properties and rights of *all* users (with the exception of their own rights and those of administrators) (page 14),
- delete users (page 14),
- link users to *all* teams (page 14),
- restrict the project view (page 42) and
- start the Customizing module and create, edit and delete objects in the administration tools.

RM organization managers

Resource organization managers have the same rights as organization managers and are also authorized to

- create and deactivate resources, and to edit the resource type
- assign, edit and delete working time models
- assign, edit and delete calendars
- assign, edit and delete skills
- edit roles
- generate, edit and delete pools
- assign, edit and delete approvals for own pools, and resources in their own pools
- start the Customizing module and create, edit and delete objects in the administration tools.

SM administrators

Administrators are responsible for supporting the entire system. They have *all* rights to intervene at any time in the event of emergencies.

The administrator is the only user with the right to perform recursive deletion; in other words, he/she is permitted to delete elements from the project or organization tree even if they still contain subordinate elements. For example, if the administrator deletes a project, all subordinate projects and schedules are also automatically deleted. Before they can delete a project , all other users must first delete all subordinate elements, unless they own them.

RM administrators

Resource administrators have the same rights as administrators and are also authorized to

- change projects to resource projects
- change schedules to resource schedules
- create and deactivate resources and to edit the resource type
- assign, edit and delete working time models
- assign, edit and delete calendars
- assign, edit and delete skills
- edit roles
- generate, edit and delete pools
- assign, edit and delete requests and approvals
- start the Customizing module and create, edit and delete objects in the administration tools
- calculate and display the resource costs.

RM supervisors

Resource supervisors are authorized to

- change their own schedules into resource schedules with scenario planning
- assign, edit and delete skills for resources in their own pools
- edit the roles of resources in their own pools
- generate pools below open departments
- edit and delete their own pools
- assign, edit and delete requests relating to their own schedules, approvals relating to their own pools, and resources in their own pools.

RM cost manager

Resource cost managers are authorized to

- calculate and display the resource costs.

External companies

Employees of external companies, e.g. component suppliers, are only permitted to view the planning data relevant to their work. To ensure that this is the case, specific views are generated for external partners in RPlan (see also "Saving views in the selection dialog" in the documentation RPlan Schedule Manager). External partners may only look at those schedules contained in the views assigned to them. They have no access to the project or organization structure tree. Employees of external companies therefore always need a contact person within your company who is able to create schedules and views for them.

Employees of external companies are authorized to

- look at those schedules compiled for them in a view (see also "Ease of use through custom views" in the documentation RPlan Schedule Manager) and
- work in their *own* schedules.

Restricting user rights

Authorized persons:

- Administrator
- Organization manager

Despite the fact that maximum transparency has been achieved in project planning, the need frequently arises to restrict the read rights of individual users or user groups - for example, if external companies are granted access to a database. Normally external companies are denied access to projects that do not concern them.

RPlan provides the *Restrict Project View* function for this purpose. Using this function it is possible to define which projects can be seen and which projects cannot be seen by a user or a department. All projects which a user/department is not allowed to see are hidden so that non-authorized persons are not even aware of their existence.

You restrict the project view as follows:

1. On the *Organization* tab in the selection dialog box you choose a user or a department whose project view you want to restrict.
2. Click with the right mouse button on the user/department and choose *Restrict Project View* in the context menu.
3. A dialog box opens in which you can specify which projects are to be visible. The entire project tree is visible as long as the *Allowed Projects* list is empty. Click on *Add*.
4. Select a project in the project tree and confirm your choice with *OK*. The project now appears in the list.
5. Repeat steps 3 and 4 if you want to release further projects.
6. When you have added all the relevant projects to the list, you close the dialog box using *OK*. The users involved can then only see the projects included in the list.

Lower-level departments/users

If you restrict the project view for a whole department, you are presented with two additional options in the restriction dialog box.

- *Restrict lower-level departments too:* If you select this option, the restricted project view applies for all lower-level departments. Otherwise, the view is restricted only for the users directly assigned to the selected department.

- *Overwrite user-defined restrictions:* Select this option if you want to delete existing restrictions which already apply to users of the relevant department and replace them with new restrictions. Otherwise, users can access all projects allowed in either of the two restriction functions.

Overview of authorizations in SM

	Authorization	SM Administrator	SM Organ. Manager	SM Project Manager	SM Sub-proj. Manager	SM Planner	SM Planning Coach	Supplier
Views	View Projects and Schedules	X[1]	X[1]	X[1]	X[1]	X[1]	X[1]	O[5]
	View Organization	X	X	X	X	X	X	-
Schedules	Create a schedule	X	-	X	O	O	X	-
	Change schedule properties	X	O	O	O	O	X	O
	Delete a schedule	X	O	O	O	O	X	-
	Modify schedules	X	O	O	O	O	X	O
	Link schedules to projects	X	O	X	O	O	X	-
Projects	Create a project	X	-	X	O+	-	X	-
	Change project properties	X	O	O	O	O	O	-
	Delete a project	X	O	O	O	O	O	-
Teams	Create team in department	X	X	O+	-	-	O+	-
	Change team properties	X	X	O	-	-	O	-
	Delete team	X	X	O	-	-	O	-
	Link users to teams	X	X	O	-	-	O	-
Dept.	Create department	X	X	-	-	-	-	-
	Change department properties	X	X	-	-	-	-	-
	Delete department	X	X	-	-	-	-	-
Users	Create user	X	X[2]	-	-	-	-	-
	Change user properties	X	X[3]	-[4]	-[4]	-[4]	-[4]	-[4]
	Delete user	X	X	-	-	-	-	-
	Restrict project views	X	X	-	-	-	-	-
Filters	Create public filter	X	-	-	-	-	-	-
	Modify public filter	X	-	-	-	-	-	-
	Delete public filter	X	-	-	-	-	-	-
Customizing	Starting the Costumizing module	X	X	-	-	-	-	-
	Creating, editing and deleting objects in the administration tools.	X	X	-	-	-	-	-

Key:

X = has rights at all levels
O = has rights to own items
O+ = has rights to own items plus open items
\- = no rights

[1] *Restrict Project View* settings supercede these defaults.
[2] Organization Managers cannot create Administrators.
[3] Organization Managers cannot change the rights of Administrators or themselves.
[4] User can create update own personal data and password only.
[5] Can only view schedules listed in own views.

Overview of authorizations in RM

	Authorization	RM Administrator	RM Organ. Manager	RM Project Manager	RM Sub-project Manager	RM Planner	RM Planning Coach	RM Supervisor	RM Cost Manager	Supplier
Projects	Converting a project into an RM project	X	-	O	-	-	X	-		-
	Resetting an RM project	X	-	-	-	-	X	-		-
Schedules	Assigning the attribute "resource planning" to a schedule	X	-	O	O	-	X	-		-
	Assigning the attribute "resource scenario" to a schedule	X	-	O	O	O	X	O		-
	Resetting the "resource planning" or "resource scenario" attribute	X	-	O	O	O	X	O		-
Resources	Setting and deleting the "available for planning" attribute for resources	X	X	-	-	-	-	-		-
	Processing resource properties	X	X	O	O	O	O	O		-
	Processing resource types	X	X	-	-	-	-	-		-
	Assigning, processing, deleting working time model	X	X	-	-	-	-	-		-
	Assigning, processing, deleting calendar	X	X	-	-	-	-	-		-
	Deactivating resources	X	X	-	-	-	X	-		-
Pools	Creating pools	X	X	O+	-	-	-	X		-
	Processing, deleting pool properties	X	X	O	O	O	X	O		-
Requests/Approvals	Creating requests	X	O+	O+	O+	O+	X	O+		-
	Creating approvals	X	O+	O+	O+	O+	X	O+		-
	Processing requests	X	O+	O+	O+	O+	X	O+		-
	Processing approvals	X	O+	O+	O+	O+	X	O+		-
	Deleting requests	X	O+	O+	O+	O+	X	O+		-
	Deleting approvals	X	O+	O+	O+	O+	X	O+		-
Costs	Calculating costs	X	-	-	-	-	-	-	X	-
Costumizing	Starting the Costumizing module	X	X	-	-	-	-	-	-	-
	Creating, editing and deleting objects in the administration tools.	X	X	-	-	-	-	-	-	-

All rights groups of the Resource Manager include the authorizations of the correspondingly named Schedule Manager groups, supplemented by specific Resource Manager rights (e.g. a Resource Manager project leader has all rights of the Schedule Manager project leader plus resource-specific rights).

Key:
- **X** = has rights at all levels
- O = has rights to own items
- O+ = has rights to own items plus open items
- \- = no rights

Overview of authorizations for searching in SM

	Authorization	SM Administrator	SM Organ. Manager	SM Project Manager	SM Sub-project Manager	SM Planner	SM Planning Coach
Search for	Schedules	X	X	X	X	X	X
	Schedules – date last changed	X	X	-	-	-	X
	Projects	X	X	X	X	X	X
	Departments	X	X	X	X	X	X
	Teams	X	X	X	X	X	X
	Pools	X	X	X	X	X	X
	Users	X	X	X	X	X	X
	User with "locked" attribute	X	X	-	-	-	-
	User login	X	X	-	-	-	-
	User with assigned rights group	X	X	-	-	-	-
	User with assigned module	X	X	-	-	-	-
	Views	X	X	O	O	O	X

Key:
- X = has rights at all levels
- O = has rights to own items
- \- = no rights

Overview of authorizations for searching in RM

	Authorization	SM Administrator	SM Organ. Manager	SM Project Manager	SM Sub-project Manager	SM Planner	SM Planning Coach	RM Supervisor
Search for	Schedules	X	X	X	X	X	X	X
	Schedules – date last changed	X	X	-	-	-	X	-
	Projects	X	X	X	X	X	X	X
	Departments	X	X	X	X	X	X	X
	Teams	X	X	X	X	X	X	X
	Pools	X	X	X	X	X	X	X
	Users	X	X	X	X	X	X	X
	User with "locked" attribute	X	X	-	-	-	-	-
	User login	X	X	-	-	-	-	-
	User with assigned rights group	X	X	-	-	-	-	-
	User with assigned module	X	X	-	-	-	-	-
	Views	X	X	O	O	O	X	O

Key:
X = has rights at all levels
O = has rights to own items
- = no rights

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